



The new **Investor Connect/RBC Advisor Connect Mobile App** is designed for Android and iPhone and includes important features for clients to enhance their experience. This document will act as a guide for the capabilities of the Investor Connect/RBC Advisor Connect mobile app as well as how to navigate each feature.

Download the app from the iPhone App Store or Google Play Store. Search RBC Connect and look for this icon:



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Dashboard: Welcome Page

The dashboard contains a brief snapshot of your portfolio values, portfolio asset allocation, market updates, and a quick way to expand your navigation menu. Scrolling down the screen will provide additional information.

Tapping on an account name after opening the drawer will bring you to the summary screen specific to that account for more details

Tapping on this thumbnail will bring you to your "My Advisor" page

Tapping on these drawers will expand the section to display each account name, its account number and market value.

You may also organize the order in which the accounts are displayed

My Accounts \$2,581,063.51	
Organize	
****360	
****360	
Market Value	\$486,954.53
****737	
****737	
Market Value	\$241,137.15
****741	
****741	
Market Value	\$0.00
****722	

Dashboard: Portfolio Asset Allocation

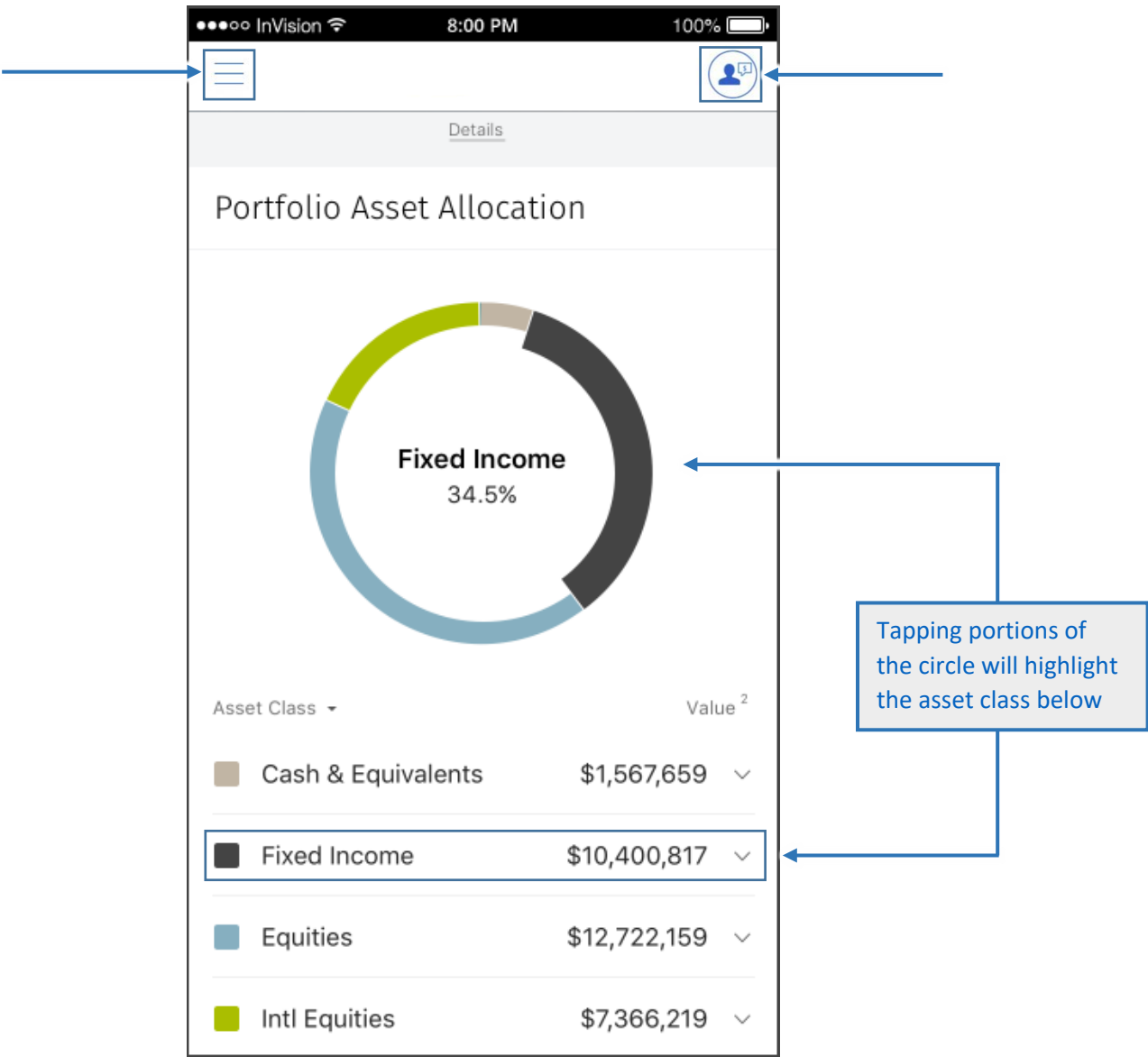
As you scroll down from the Welcome portion of the Dashboard you will find a snapshot of your Portfolio Asset Allocation. The same Navigation and My Advisor buttons are available at the top of the

"Hamburger" button will slide out your navigation screen for

Tapping on this thumbnail will bring you to your

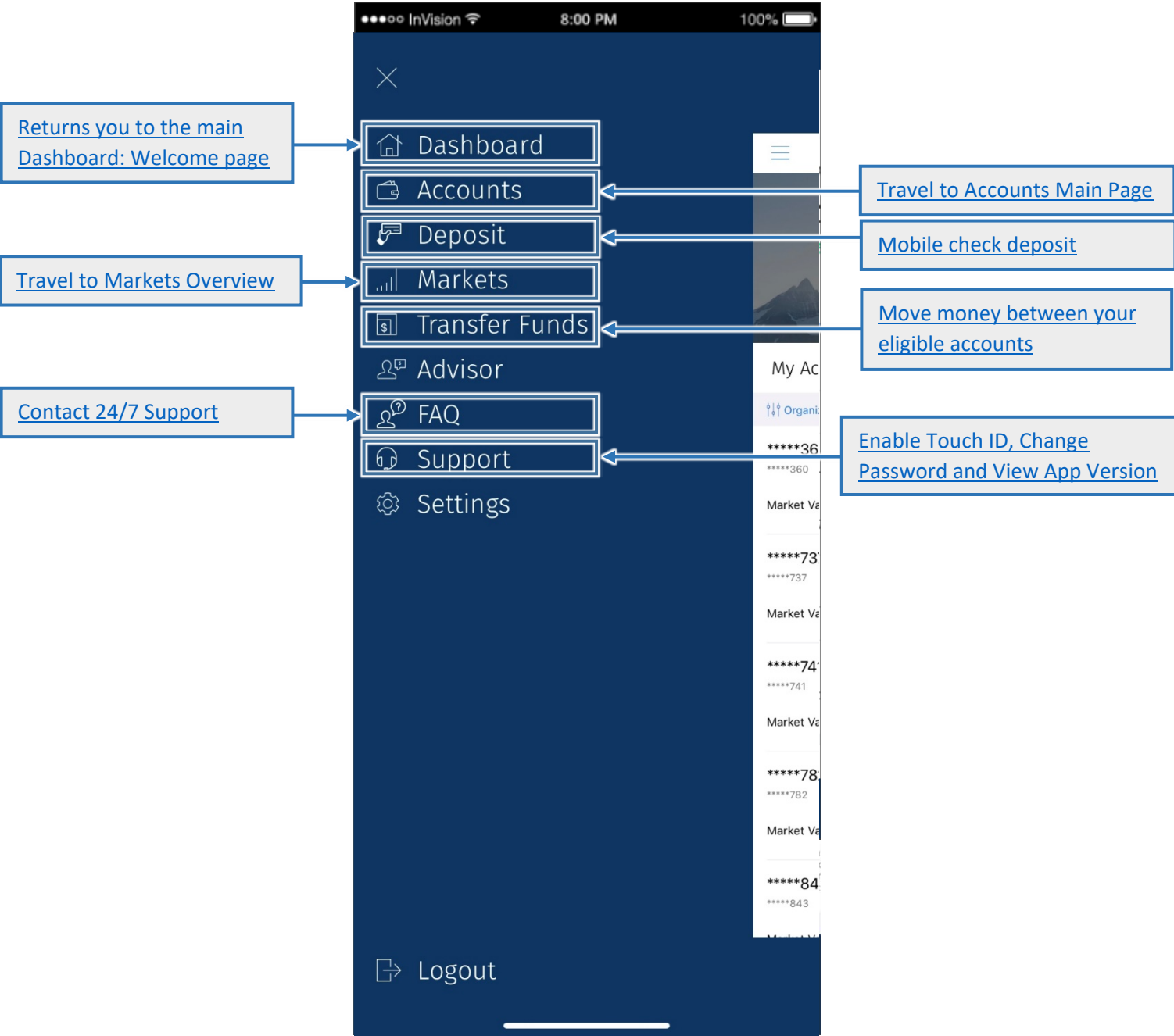


screen for convenience.



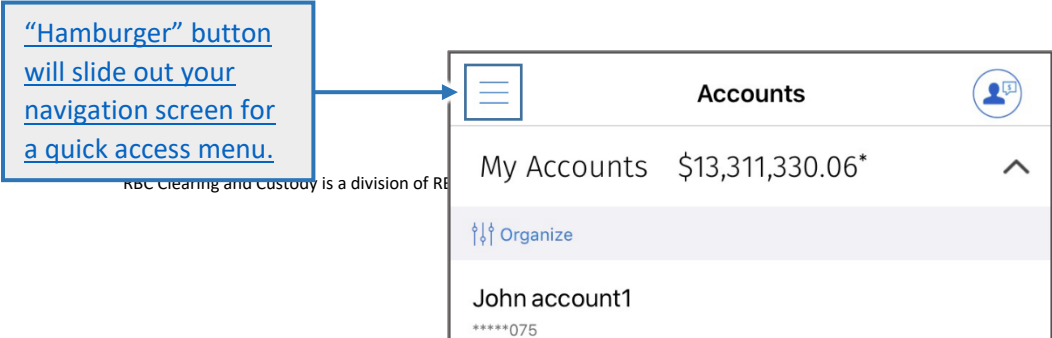
Navigation Menu

The Navigation Menu is available on all pages of the app by clicking the “Hamburger Button” in the top left corner in the page. When the menu appears select any of the available buttons to jump to the corresponding page, contact support, adjust your settings, or log out of your account.

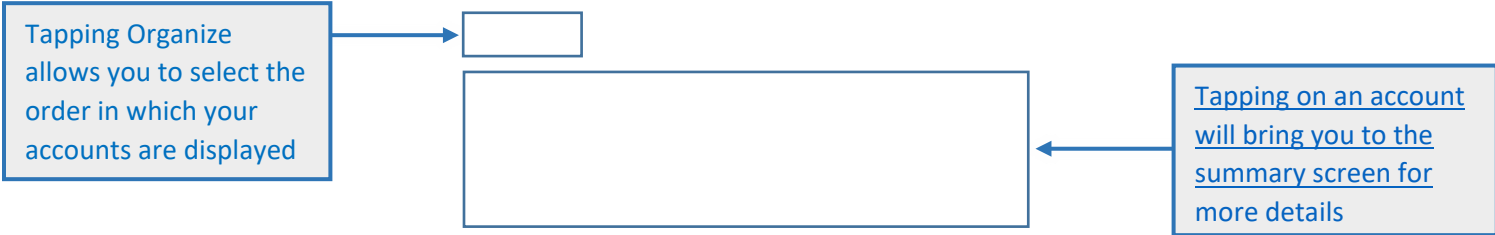


Accounts: Main Page

The Accounts page provides a snapshot of your current accounts. From this page you can navigate between accounts by tapping any of the major fields. Each field allows you to drill down into further details about the specific account.



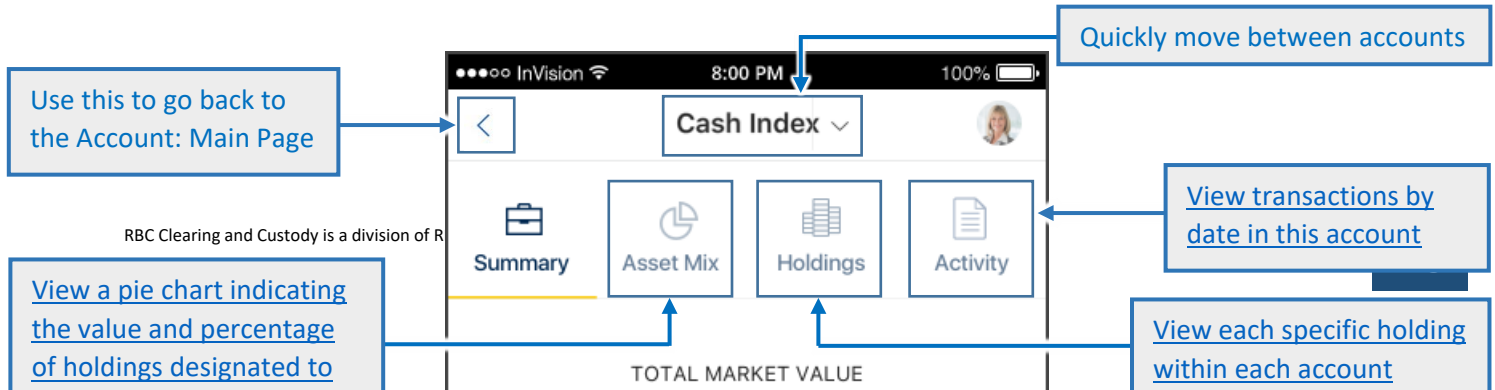
RBC Clearing and Custody is a division of RBC



Accounts: Summary Page

This page lays out the overall value of the specific account as well as performance data at different intervals from daily, monthly, quarterly, and more all the way back to account creation.

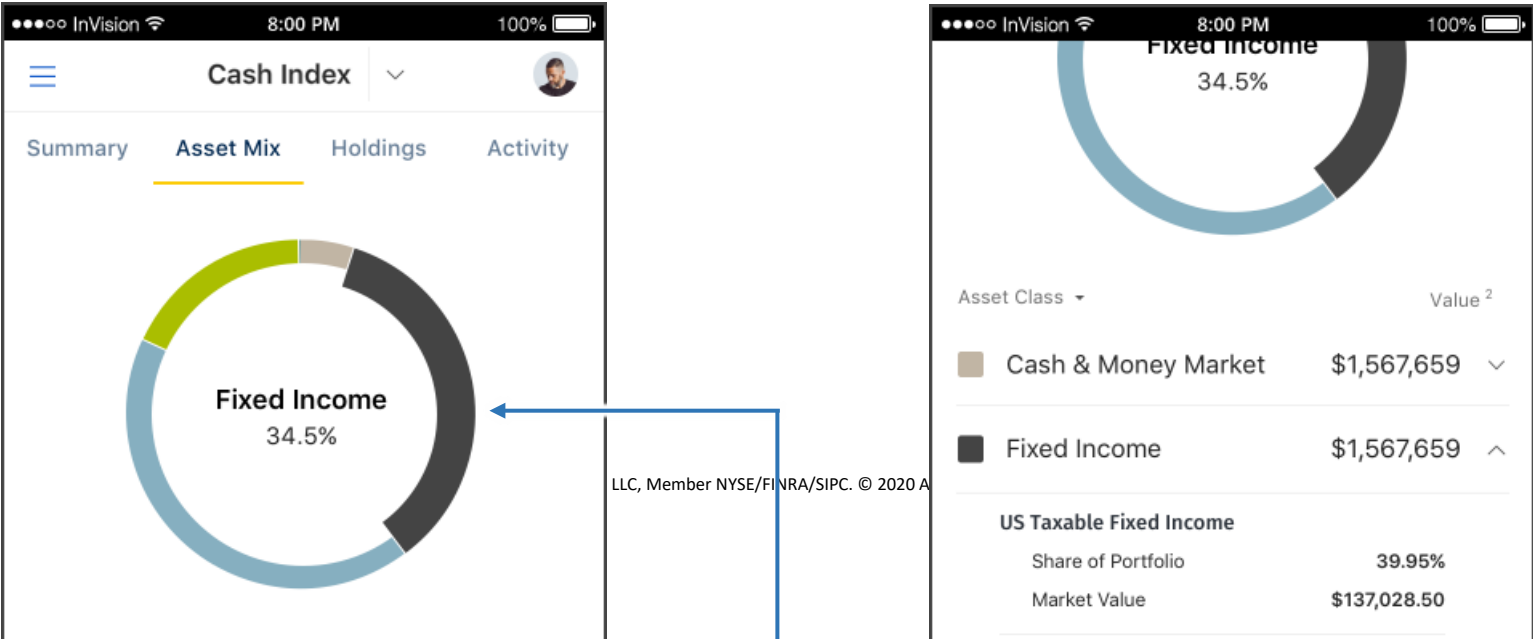
*External accounts will only see a brief account summary without performance, holdings, and transactions





Accounts: Asset Mix

Similar to what you see on the Dashboard when you scroll down, here you can review the makeup of each account by asset class and what specific investments makeup that asset class.





Accounts: Holdings

View your individual investments, their market value, and their performance.

Filter by Description, Market Value, or Gain/Loss

Cash Index

SummaryAsset MixHoldingsActivity

Refine ResultsDescription

Expand AllCollapse All

Equities\$10,130,561

3M Company
MMM
Market Value\$444.88
Unrealized Gain/Loss\$42.34

Abb LTD
ABB

Tapping the asset investment type will reveal the full list

Tapping this will take you to the market

ABB

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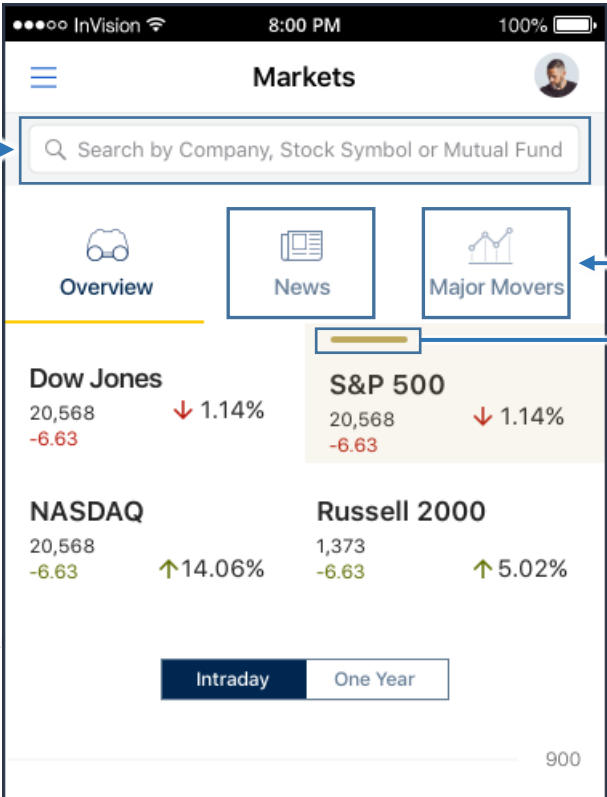
Here you will find a list of all transactions that have occurred within the account that you selected. Filter between dates to find a specific transaction or Refine Results to search by transaction types.



Markets: Overview

The Markets Overview page provides the user insight into the recent and yearly performance of the major stock indexes. You can navigate between them, search for details on a specific company, stock or mutual fund, or you can use the app to read news articles and view the best and worst performing stocks for that day. After the market has closed the app will default to One Year – during market hours Intraday will be default.

Quickly search for the company or investment you're interested about



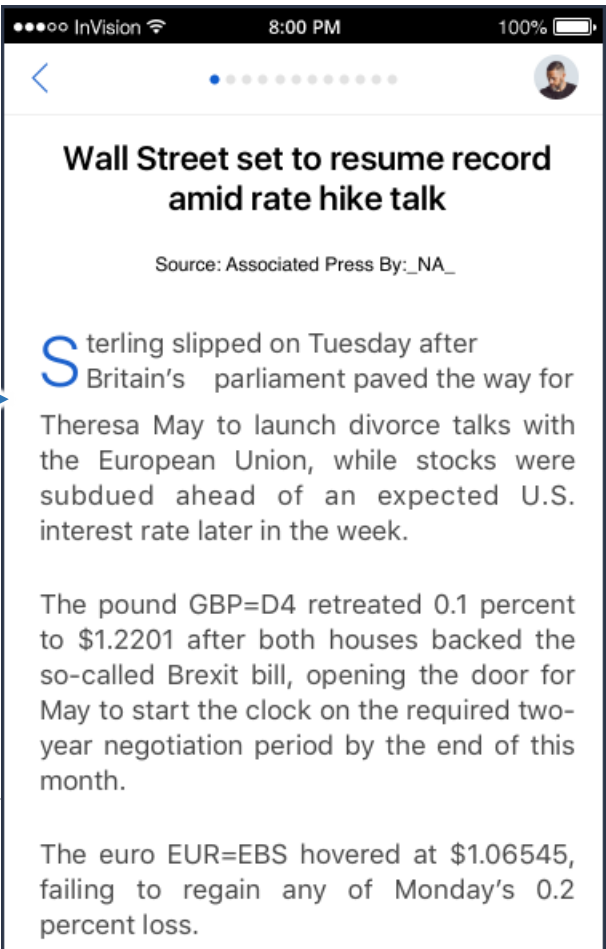
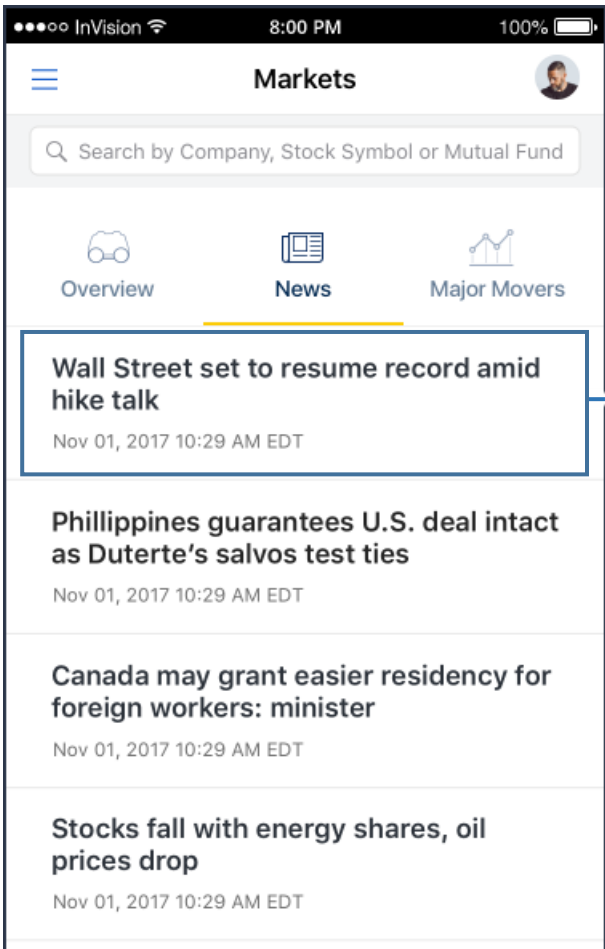
View the biggest gains and losses from the day

Tapping on the different indexes will highlight their results on the graph below. The selected index box its line on the graph will have a matching color



Markets: News

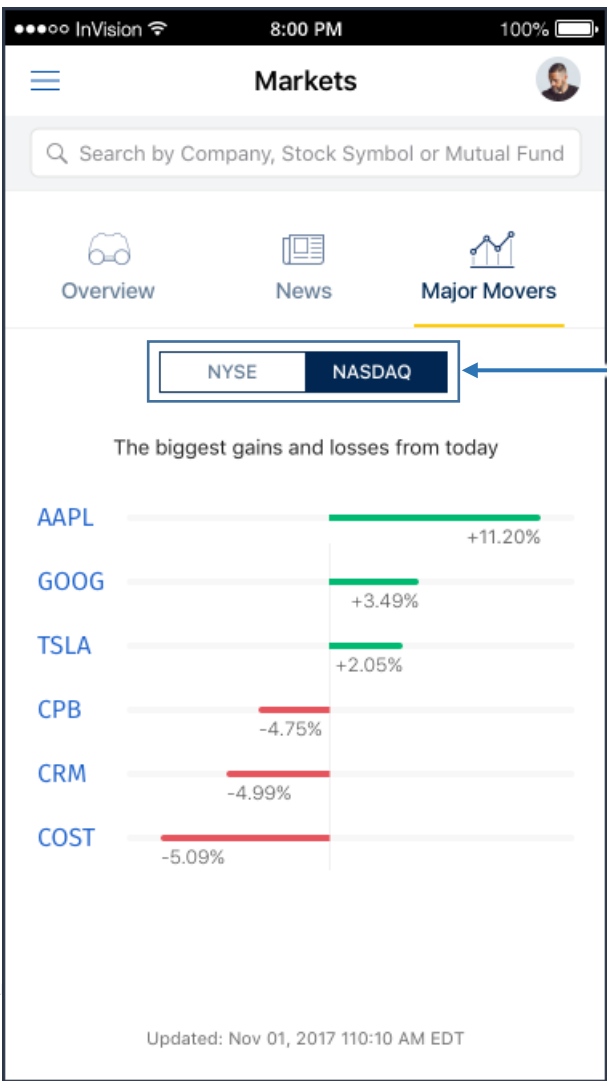
Read up-to-date articles on information that can affect the market and your investments. On the article screen the dots indicate which article you’re viewing and you can swipe left and right to go to the next article or previous article. If you search “Google” and scroll to the bottom of the results page there will be a tab for related news.





Markets: Major Movers

This page provides you with a visual representation of the stocks with the highest growth and largest drop in value for the day. You can learn more about each stock by tapping on its ticker symbol.





Transfer Funds

Here you can schedule a transfer between eligible accounts. Some fund transfers are executed immediately while others will be pending while receiving approval.

Follow each step of the process as it becomes available. As you select the “From Account” the next field will be available for selection and will include only eligible accounts based on which account the transfer is coming from.

If you do not see the this feature,
please contact your financial professional

InVision8:00 PM100%

Transfer Funds

Transfer funds between eligible accounts. Some funds transfers are executed immediately, others will be pending while receiving approval.

From Account
Select Account

To Account
Select Account

Transfer Date

Amount
\$0.00

Description (optional limit 29 characters)

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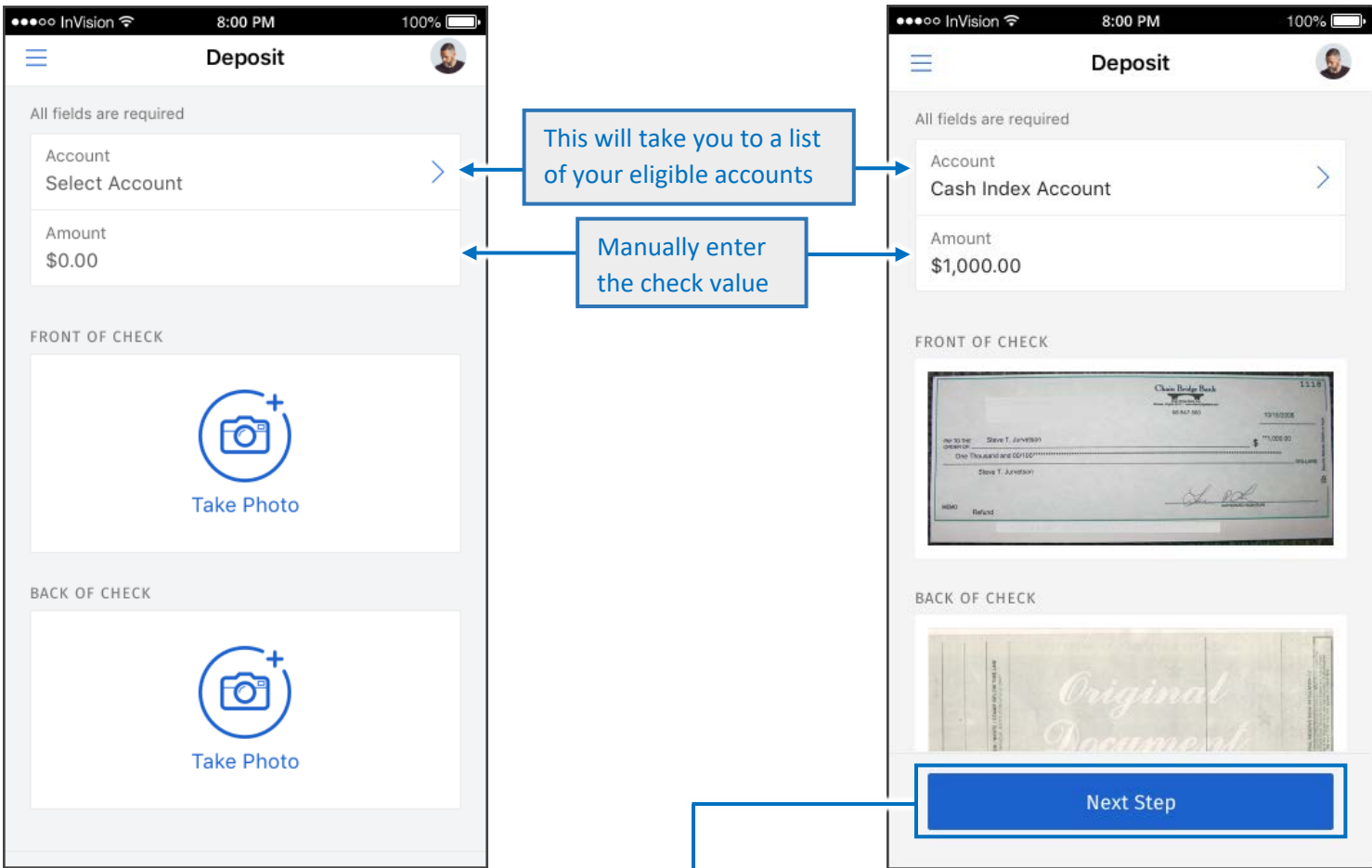
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Check Deposit

This page allows you to quickly and easily deposit a check to any eligible account by taking a photo of the front and back of the check with your device’s integrated camera. Moving away from this screen will cancel any progress. There is a daily deposit limit of \$100,000 and a monthly deposit limit of \$250,000.



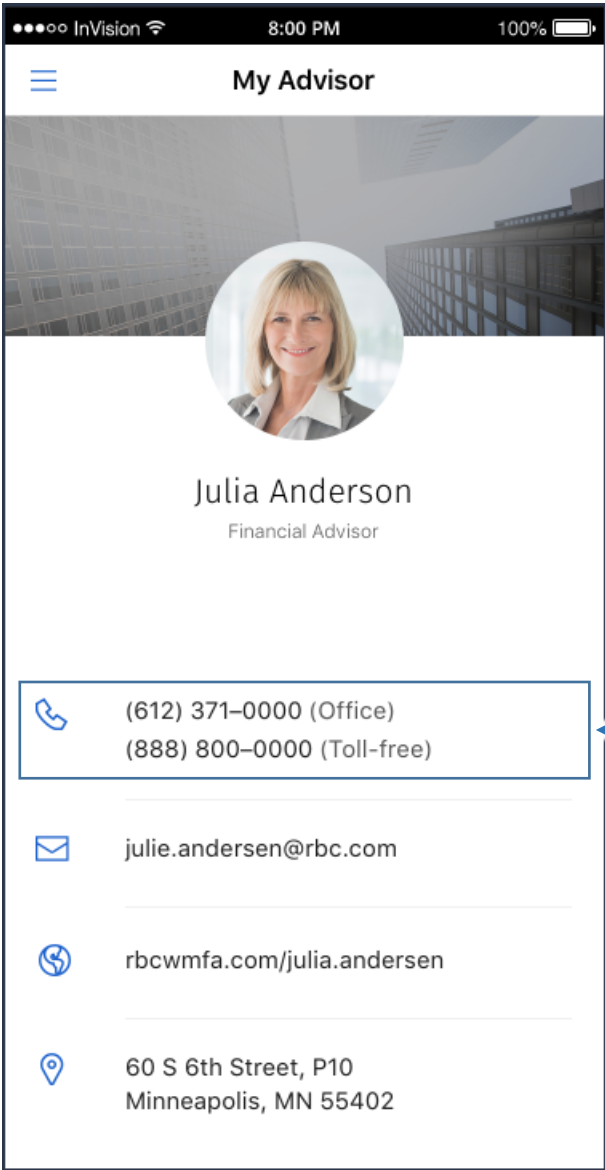
RBC Clearing a

Tapping “Next Step” will bring you to a screen asking you to confirm that you’re ready to deposit the check. On that screen, tapping the “Submit” button will bring you to a final confirmation screen. From there, you can tap on the “Make another Deposit” button to start the process over with a new check or you can select the navigation hamburger button at the top left to move to another part of the app.



My Advisor

The “My Advisor” page is intended to give you a quick way to contact their advisor. From this page you can find their office number, mailing address and website address within your native mobile map.

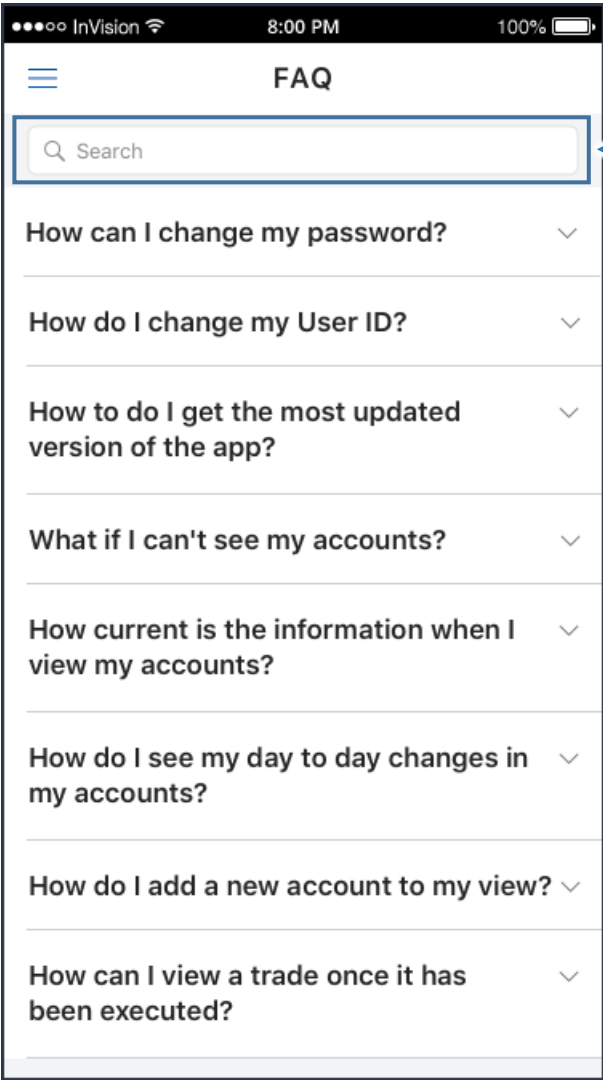


Contact your advisor by phone

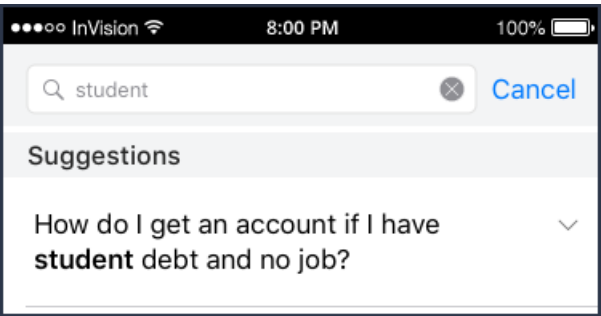


FAQ

This page houses commonly asked questions and the responses/Solutions. Simply click on the question or the chevron and the topic will expand to show the answer.



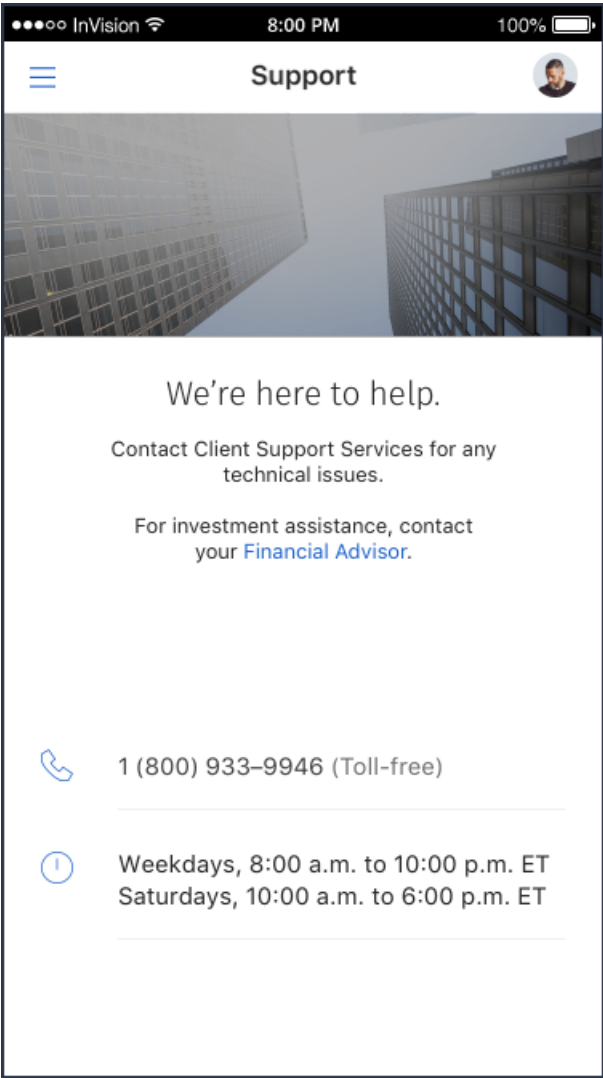
You can search for your own questions as well if you do not see it in the list provided. Type in a keyword and the app will find all associated FAQ's





Support

If you have questions regarding the RBC Connect Mobile App the support page provides contact information to our Client Support Services. With questions regarding your accounts and investments, contact your Financial Advisor. This page acts very similarly to the My Advisor page: Tap on the phone number to call.





Settings

Within the Settings Page you can activate or deactivate the Touch ID or Face ID sign in capability or change your password (Face ID feature only available on iPhone X or newer – those with older models may only see Touch ID options).

